UCLA Academic Senate

April 21, 2026

Julio Frenk
Chancellor, UCLA

Darnell Hunt
Executive Vice Chancellor & Provost (EVCP), UCLA

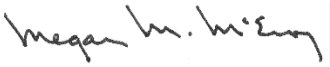
Re: Budget Transparency Protocol

Dear Chancellor Frenk and EVCP Hunt,

I have enclosed the final version of the Budget Transparency Protocol that has my agreement along with EVCP Hunt, Interim Vice Chancellor/Chief Financial Officer Hanna-Harwell, and Vice Chair/Chair-Elect Tim Groeling. The Council on Planning and Budget (CPB) unanimously endorsed this final protocol at its April 13, 2026, meeting.

We are hopeful that this Budget Transparency Protocol will allow for a timely and robust CPB consultation on the budget and finances of the university by receiving frequent and transparent information from administration to inform their advice to you. Moreover, this Protocol provides a welcome and concrete plan to strengthen shared governance at UCLA. We appreciate your efforts in its development.

Sincerely,



Megan McEvoy
Chair, UCLA Academic Senate

Encl.

Cc: Kathy Bawn, Immediate Past Chair, UCLA Academic Senate
Richard Desjardins, CPB Chair, UCLA Academic Senate
April de Stefano, Executive Director, UCLA Academic Senate
Elizabeth Feller, Associate Director, UCLA Academic Senate
Tim Groeling, Vice Chair/Chair Elect, UCLA Academic Senate
Reem Hanna-Harwell, Interim Chief Financial Officer, UCLA
Rebecca Lee-Garcia, Associate Vice Chancellor, UCLA Academic Planning and Budget
Emily Rose, Assistant Provost and Chief of Staff to the EVCP, UCLA
Julie Sina, Chief of Staff to the Chancellor, UCLA

UCLA Academic Senate
Council on Planning & Budget

April 13, 2026

To: Megan McEvoy
Chair, Academic Senate

From: Richard Desjardins
Chair, Council on Planning and Budget

Re: Budget Transparency Protocol

At its meeting on April 13, 2026, the Council on Planning and Budget (CPB) discussed the Proposed Budget Transparency Protocol, version 5.0. CPB members unanimously endorsed the protocol pending the change in the first sentence under *1. Scope of Consultation* from "regularly" to "frequently".

If you have any questions, please do not hesitate to contact me at desjardins@ucla.edu, or via the Council's analyst, Elizabeth Feller, at efeller@senate.ucla.edu.

cc: Kathleen Bawn, Immediate Past Chair, Academic Senate
Tim Groeling, Vice Chair/Chair Elect, Academic Senate
April de Stefano, Executive Director, Academic Senate
Elizabeth Feller, Associate Director, Academic Senate
Members of the Council on Planning and Budget

BUDGET TRANSPARENCY PROTOCOL

Version 6.0, Final

April 21, 2026

Purpose

To reaffirm the consultation procedure of shared governance while ensuring clarity around confidentiality, timing, and external communications in the annual campus budget process.

1. Scope of Consultation

Budget consultation between the administration and the Academic Senate will continue frequently throughout the fiscal cycle. Materials will be provided with appropriate lead-time for the Senate to fulfill its advisory role per Regental Bylaw 40.1. The Administration will share materials with Council on Planning and Budget (CPB), to include:

- Written briefings on significant financial/budgetary matters, marked as 'Draft' as appropriate.
- Written materials when data are finalized and appropriate for distribution.
- Opportunities for questions, clarification, and feedback prior to formal Senate consultation and Administration's decisions, as appropriate.
- Written data tables in a format (Excel, Tableau download, etc.) from which data can be easily extracted.

2. Treatment of Draft and Preliminary Information

Administration will share timely draft, preliminary, or evolving budget data in written form directly to CPB. Such information is typically not presumed releasable or distributable beyond the immediate consultation context. Information that is still under development will be marked by Administration as 'Draft' in good faith. Privileged, personnel-related, legally sensitive, or system-constrained data will never be shared on the record.

The Senate will conduct responsible analyses and deliberations in a timely manner. If final data are not available then Senate may release analyses based on the best available information, with the appropriate caveats.

3. Confidential Advisory Bodies

Participation in confidential advisory groups (e.g., the Executive Budget Action Group) carries an obligation to preserve confidentiality and deliberative space. Members serving in

these roles do so as advisors, not as representatives authorized to publicly disclose or characterize internal deliberations. Senate participation on administrative advisory groups is not a substitute for the formal consultation process described above. If substantiated concerns about the ability to maintain confidentiality within Senate leadership and select members of the Senate arise, participation in such groups and/or staging of information will be jointly reconsidered to preserve the integrity of the process.

4. Public Dissemination, External Communications and Media Engagement

Neither the Administration nor the Academic Senate will release budget-related internal governance documents, draft reports, or internal correspondence between parties to external media without reasonable advance notice to the other party. When internal materials are shared publicly or released externally, both parties acknowledge that public response or clarification by the other may be necessary. The principle of "no surprises" applies reciprocally. Importantly, public records requests should be referred to the UCLA Compliance Information Practices Office.

5. Timeline and Deliverables

The Administration and Senate agree to the following annual schedule:

Fall:

- CFO provides budget-related materials to CPB, such as a summary and detailed breakdown of core and general funds, balances and projected surplus/deficit, to begin the budget consultation process.
- An annual budget Town Hall for the Academic Senate faculty, co-led by the CPB Chair and the Chief Financial Officer (CFO) (or CFO's designate), on budgetary news and with a Q&A.

Winter:

- While not required under Regents' Bylaw 40.1, CPB members will be invited to attend unit-level budget conference meetings to inform their analyses.
- CPB conducts analysis of data shared to date and provides written consultation to CFO, Academic Senate Leadership and the Executive Board.

Spring:

- CPB provides an end-of-year report that identifies the major budgetary issues and discussions that took place in the course of the year.
- Administration provides CPB with the detailed final campus budget for the upcoming fiscal year.

Late Summer or Early Fall:

- Annual budgetary retreat in late summer where Administration and Academic Senate jointly review the budget decisions and process of the prior year and establish top priorities, plans and challenges for the coming fiscal year. Participants will include incoming and outgoing CPB Chairs, Senate Leadership, CFO, EVCP, and Chancellor.

Other:

- Quarterly CPB meetings with the Chancellor and/or EVCP to share perspectives on campus priorities in planning and budget.

6. Periodic Review

This protocol will be reviewed jointly at least annually to ensure it remains aligned with campus needs and shared governance norms.

Intent

This protocol is designed to protect good-faith consultation, mutual trust, and the shared academic mission—not to limit engagement or transparency, but to make both sustainable.

Darnell Hunt
Executive Vice Chancellor & Provost, UCLA

Megan McEvoy
Chair, UCLA Academic Senate